Using forms in SchoolSpeak

Form Webinar Series
Overview

- Part 1 – Introduction to Online Forms
  - Introduction to Online forms
  - Introduction to SchoolSpeak's Forms resource
  - Sample uses of forms
  - Using forms for your school's application and registration process

- Part 2 – Creating a new form
  - Adding a form to a group
  - Setting and configuring a form –
  - Building a new form
  - Editing a previously existing form

- Part 3 – Forms – Advanced Options
  - Advanced options for forms

Part 1 – Introduction to Online Forms in SchoolSpeak

What is an Online Form?

- An Online Form allows a school to collect data from members directly into SchoolSpeak

- A form that is uploaded as an attachments is <u>not</u> an online form

- SchoolSpeak's online forms
  - Can integrate with member profiles.
    - For example, data captured in the application form may be pushed into a profile.
  - May be attached to a profile
  - Can assess and accept payment information through the forms
    - Cash, Check, PayPal* or Vanco*
    - *School must be setup to handle PayPal or Vanco payments

What can Forms do in SchoolSpeak?

- Forms may be used to collect data or information from members and visitors

- A form may be added to any group within SchoolSpeak

- Administrators may opt to assess fees as part of the form process

- Data captured in an admission form may be transferred to member profiles when member is added

- Administrators can provide other members with permission to work on a form

  - Office Staff, PTO, Coordinators, Business Managers, Admissions Directors

- Do not need to know HTML to use our forms

Examples of types of forms

- Examples of where forms may be used
    - Afterschool club/sports registration
    - Information inquiry
    - Surveys
    - New Student application
    - Re-registration and tuition agreements
    - Orders (may also use Online Order Depending on use), donation

Examples of Forms – Sample uses

Additional Thoughts on Forms

- Generally do not recommend making a form for:
  - Emergency Contacts
  - Medical information
    - Doctors
    - Dentists
    - Allergies

- Use the Profile Update to capture this information
  - Can use profile update
    - In the beginning of the year
    - Random times that are appropriate
    - Re-Enrollment/Re-registration

Applications and Re-Registration

Definition Time
Application vs Re-Enrollment

Application

- Submitted for a new student applying to your school

- Maybe used by a current family with a new student or a new family to the school

- Typical information asked for:
  - Student name and contact info
  - Date of Birth
  - Basic student data

- Application process may involve additional forms like a tuition agreement or financial document

- Can be completed by visitors (users who are not members of SchoolSpeak)

Re-Enrollment

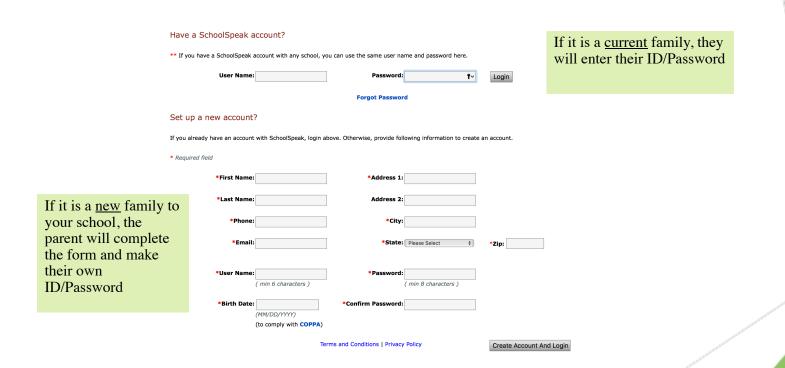- Used for current students returning to your school for next school year

- Generally use SchoolSpeak's **Profile Update** as way to gather information

- Re-Enrollment Process may involve a tuition agreement or other financial documents

- May be used in conjunction with SchoolSpeak's Return for Next Year report

- Accessible only to SchoolSpeak members

Re-Enrollment Process(General)

New Applicant process (General)

New Applicant – Step 1
New family clicks Admission on school Website

Have a SchoolSpeak account?

** If you have a SchoolSpeak account with any school, you can use the same user name and password here.

User Name: [_____]   Password: [_____]   Login

Forgot Password

Set up a new account?

If you already have an account with SchoolSpeak, login above. Otherwise, provide following information to create an account.

* Required field

*First Name: [_____]	*Address 1: [_____]
*Last Name: [_____]	Address 2: [_____]
*Phone: [_____]	*City: [_____]
*Email: [_____]	*State: [Please Select] *Zip: [_____]
*User Name: [_____] (min 6 characters)	*Password: [_____] (min 8 characters)
*Birth Date: [_____] (MM/DD/YYYY) (to comply with COPPA)	*Confirm Password: [_____]

Terms and Conditions | Privacy Policy   Create Account And Login

If it is a current family, they will enter their ID/Password

If it is a new family to your school, the parent will complete the form and make their own ID/Password

Thank you for joining us, if you have any
questions please contact us

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